REPORT ON THE VEAP
BUSINESS INTELLIGENCE SUMMIT

Held June 25, 2008

Patrick Henry Building
Richmond, Virginia

Report on The VEAP Business Intelligence Summit – June 25, 2008

On June 25, 2008, the Virginia Enterprise Application Program (VEAP) hosted a Business Intelligence Summit for business and technical staff of the Executive Branch Agencies of the Commonwealth of Virginia.

The main goals for the BI Summit were:

- Progress update for VEAP and BI Initiative

- Establish a common vision for creating a Business Intelligence Competency Center (BICC)

  o Primary goal of BICC (outcomes, benefits)

  o Establish BICC general requirements

- Discuss the best go-forward strategy for establishing the BICC

- Solicit participants for BICC planning task groups

- Confirm the Executive Sponsor

50 business and technical staff from 21 agencies attended the Summit

This report documents the results of the Summit:

- List of attendees – pages 3–4

- Feedback Documents – These summarize the input from the attendees

  o Present state of business intelligence – page 5

  o Desired future state of business intelligence – page 6

  o Suggested business requirements for the BICC – pages 7–8

  o Summary of results of the attendees' post–meeting surveys – pages 9–16

- Presentation slides and notes – On the VEAP web site:

http://www.veap.virginia.gov/documents/Summit%20Presentation%20-%2006252008%20-%20Final.pdf

Additional information on the VEAP Business Intelligence Initiative is available at:

http://www.veap.virginia.gov/business_intelligence_initiative.shtml

Frequently Asked Questions: http://www.veap.virginia.gov/bifaqs.shtml

VEAP BI Summit Meeting Attendees - June 25, 2008

Participant Name	Commonwealth Organization
Adams, Sandy	Virginia Department Agriculture Consumer Services
Bowling, Roger	Virginia Department of Aviation
Brown, Cathie	Virginia Information Technology Agency
Bulling, Abdulaziz	Virginia Department of Transportation
Burdette, Randall	Virginia Department of Aviation
Burhop, David	Department of Motor Vehicles
Burns, Jim	Virginia Department of Health
Caudill, Shane	Department of General Services
Clements, Jim	Department of Environmental Quality
Dodson, Debbie	Virginia Information Technology Agency
Dorsey, Syd	Secretary of Technology
Faas, Rudy	Virginia Information Technology Agency
Ford, Linda	Department of Motor Vehicles
Gilday, Ray	Virginia Department of Transportation
Graham, Kathy	Department of Game and Inland Fisheries
Gephart, Vickie	Department of Environmental Quality
Greenfield, Lynette	Department of Juvenile Justice
Hammel, Michael	Virginia Information Technology Agency
Holmes, Edward	Department of Juvenile Justice
Humphreys, Vicki	Department of Business Assistance
Jenkins, Robert	Department of Juvenile Justice
Jones, Loyde	Department of General Services
Kusiak, Jane	Council on Virginia's Future
Lancaster, Marion	Department of General Services
Linde, Christopher	Department of Motor Vehicles
Martin, JoJo	Virginia Enterprise Application Program
Maul, Michael	Department of Planning and Budgeting
McCabe, Kenneth	Department of Planning and Budgeting

VEAP BI Summit Meeting Attendees - June 25, 2008

Participant Name	Commonwealth Organization
McCabe, Randy	Department of Accounts
Meiller, Peter	Department of Environmental Quality
Moen, Dennis	Virginia Department of Health
Newby, Scott	Department of Motor Vehicles
Nott, Cathy	Virginia Department Agriculture Consumer Services
Paquette, Patricia	Department of Health Professions
Peters, Jennifer	Department of Motor Vehicles
Rao, Murali	Virginia Department of Transportation
Richardson, Todd	Virginia Information Technology Agency
Ritter, Arthur	Department of Social Services
Rosenfeld, Mitch	Department of Planning and Budgeting
Reynolds, Pat	Virginia Information Technology Agency
Salkeld, Dick	Department of Accounts
Scrivani, John	Department of Forestry
Sievert, Bob	Department of General Services
Spears, David	Department of Mines Minerals and Energy
Stover, Jeff	Virginia Department of Health
Tomczak, Mark	Virginia Employment Commission
Wagner, Bryan	Department of General Services
Waldrop, Wayne	Department of Business Assistance
Ward, Peggy	Virginia Information Technology Agency
Ward, Herb	Department of Environmental Quality
Williams, Brad	Department of Forestry

VEAP Team

Alston, Almeater	VEAP Business Intelligence Initiative
Dix, Stephan	VEAP Business Intelligence Initiative
Feldmann, Peggy	VEAP Director / Chief Applications Officer
Flanagan, Paul	VEAP Business Intelligence Initiative
Nottingham, Leonard	VEAP Business Intelligence Initiative
Watson, Pam	VEAP / Department of Human Resource Management

Present State:
What BI issues do you think are most critical right now?

1. Data Interchange Intra / Extra Agency
2. Data Security / Privacy in a leveraged Environment
3. Taxonomy
4. Actionable requirements
5. Tools that would allow us to securely share data / reports with our allies
6. Usability for users
7. Tool must be robust enough to handle disparate data
8. Data definitions across multiple agencies
9. Usability from end user perspective
10. Tool capable of handling wide variety of disparate data
11. Establish consistent and precise data dictionary across enterprise
12. Do you get the tool integrated into a COTS solution or use the standard BI tool?
13. How do you integrate between the various tools?
14. Defining system of record data owners, stewards, custodians
15. Data exchange standards, data standards
16. Business – getting business users engaged in defining the rules / needs
17. Combining data that is apples and oranges
18. Understanding what BI is
19. Security of Sensitive Data
20. Mainframe Cost Savings
21. Data quality
22. Business Process Management
23. Misunderstanding of what BI is and can do
24. Challenges in consolidating data from multiple sources
25. Access to data tracked in applications
26. Access to data not yet available in any applications / systems
27. Data quality and accountability
28. Data stewardship / ownership
29. Could all agencies use BI for administrative functions such as SWAM use?
30. Could DHRM use BI to get out human resource data such as trainings, #'s of new hires, ADA requests?
31. Shared tool great
32. Shared environment – unreal
33. Resistance to using tools
34. Fear of exposure of data / trends info

Future State:
What does success look like?
– What are the prime characteristics of what we want in BI?
– What do we want the future state of BI to look like?

1. Establishing Data Standards
2. An Enterprise Data Warehouse is magically created
3. Standardization
4. Low / No Cost
5. Data Standardization so data when pulled is comparable
6. Free – not another unfunded mandate
7. Data Standardization
8. BI as easy as Google
9. Easy to run and share a report
10. Same tool used across all agencies
11. Single point of data entry and extraction
12. Ability to collate easily between disparate data sources
13. No re-entry of information anywhere
14. Business definition of metrics and data that meets the definition
15. Stream lined (one Stop) – Google example
16. User friendly
17. Common set of tools
18. Secure manner to share sensitive reports with non-executive agencies and localities
19. Interface that can abstract I.T. from the process of reporting @ 90% level
20. Easy access to accurate, up-to-date, actionable / pertinent data
21. Empower employees to do their job better by using available (actionable) information
22. Availability of software, tools, best practices and experienced help to provide BI support for my agency.
23. <u>Characteristics</u>
    a. Timeliness of data / information
    b. Ease of use
    c. Comprehensive information with good data dictionaries
    d. Customizability
    e. Instantaneous response
    f. Friendly interface
24. Future State
    a. Google for VA data
25. Data Standards / templates ** data exchange standards
26. Defined Roles – owner, stewards, custodians
27. Central, shared, quality data repositories for common data
28. General Fund Model
29. Commonwealth will have one-stop shop for reporting administrative summaries for all agencies. Examples include HR, Procurement, Finance, etc.

BICC Requirement *(as captured on Summit note cards and during Summit discussions)*	VEAP BI Team's Understanding of Requirement *(subject to validation / update in BICC planning sessions)*
Facilitate best practices and coordination among agencies	The BICC must work to incorporate best practices and foster coordination among agency BI efforts.
Provide support for the BI implementation	The BICC must provide resources (e.g., training, analysis, development, and administration) to assist agencies as they work to stand up BI implementations.
Cost of BI services *(Note: one note card indicated consideration should be given to charging an hourly rate for services)*	The BI Initiative must involve agencies in planning costs for services it plans to charge agencies.
Facilitate access to data across agencies	The BI Initiative must work to enable (where appropriate and necessary) access to data that spans multiple agencies to meet reporting and analysis requirements.
Define the real benefit for each agency – how does BI benefit the citizens	The BI Initiative and the BICC must work with agencies to make sure that there is business value (either internally to the agency or to the citizens of Virginia) before proceeding with a BI implementation.
Focus on information not data	The BI Initiative and the BICC must focus on producing meaningful and useful information that can be derived from raw data.
Training	The BICC must provide training for agencies who are interested in using the BI toolset that VEAP plans to provide in the shared environment.
Develop common core data sources for HR, payroll and CARS that can be accessed by each agency	The BI Initiative should consider an "enterprise" repository(ies) for common functions shared across agencies provided that these can be leveraged to provide real business value.
Executive sponsorship	The BI initiative must have strong, visible and active executive sponsorship in order for the initiative to be successful.
Culture change related to data sharing	The BI Initiative must help coordinate change leadership activities that produce a comfort level and collaborative spirit necessary to adapt to a shared data environment.
Helping agencies get started	The BICC must provide agencies with support (tailored to agency needs) in order to help "jump start" and sustain their BI implementations.

BICC Requirement *(as captured on Summit note cards and during Summit discussions)*	VEAP BI Team's Understanding of Requirement *(subject to validation / update in BICC planning sessions)*
Agency self reliance	The BI Initiative and the BICC must work with agencies to help them become proficient in any new BI capabilities and able to support their own implementations.
Develop at a deliberate speed	The BI Initiative and the BICC must bring BI implementations up in the shared environment at a pace that is not too slow (and therefore not able to sustain positive momentum) or too quick (and therefore the Initiative / BICC has more than it can effectively manage).
Performance of shared environment	The BI Initiative must provide a robust shared BI environment that can accommodate multiple agency BI needs simultaneously. Performance planning must consider how information will be retrieved and delivered in a physically distributed architecture (i.e., one where the data resides in a location separate from the reporting layer). This planning must also consider how priorities for usage of the shared environment will be set (especially if there is not a charge for usage of the shared environment).
Align BI tools and strategic planning	The BICC must work with agencies to make sure that BI implementations deliver real business value. This value will come by aligning the use of new tools with CoVA and agency strategic planning efforts.
Manage shared environment (hosted by VITA)	The BICC must coordinate the management of the shared BI environment so that as new implementations are added (from different agencies) that the 3-way (VEAP/BICC, VITA and agency) coordination for on-boarding to the shared environment is straight-forward and VEAP/BICC led.
Change leadership	The BICC must provide agencies with change leadership resource and tools to assist with addressing impacts of BI implementations on agency employees.

I. Summary of the Business Intelligence Competency Center (BICC) Summit Survey Results

The BICC Summit, hosted by VEAP, was held on June 25, 2008. Fifty business and technical staff from 21 agencies attended. Twenty-three BICC Summit participants volunteered to participate in the establishment of the BICC. The survey results were compiled from 35 summit participant responses to 12 questions. The survey questions and participant responses can be found in section two below.

Ninety-seven percent of survey participants believed the purpose of the summit was communicated clearly, and 88% felt that their summit role was clarified through pre-summit Business Intelligence Initiative (BII) e-mail notifications. A few survey participants would like to have seen more information on the types of roles individuals might play during the establishment of a BICC. Summit participants prefer to be updated regarding BII events by e-mail, phone, and through BII website postings in that order.

Eighty eight percent of survey participants believed that the summit format was appropriate and 94% believed that the duration of the summit was adequate. In future meetings, survey participants would like more time allotted for interactive small group work.

Almost 100% of survey participants believe that the VEAP BII team had provided a good explanation of: a) Business Intelligence (BI); b) the BI Initiative; and c) the BICC. Many of these participants would have liked more information on BICC and BI benefits and would also like to have seen a demonstration of the BI tool. One individual believed further explanation was required because BI is much broader than what was presented during the summit.

Eighty-six percent of survey participants thought that summit proceedings met their expectations while 54% of participants thought that the summit team had captured the necessary BICC requirements. Most participants surveyed believed the summit was a good starting point from which agencies can further define BICC requirements. For some participants the idea of a BICC was a new concept and this made it difficult for them to fully participate during the BICC requirements session. A few participants stated they would like to have reviewed examples of a successful BICC and BI implementation conducted by other states and/or private enterprises.

Questions 11 and 12 solicited survey participants' advice on the establishment of the BICC and recommendations for improving future BICC meetings. Detailed responses to these questions can be found under the individual questions below. Key survey participant advice centered on reaching out more to agency business managers, maintaining frequent and honest communications, soliciting feedback from all stakeholders, and maintaining a BI Initiative schedule that agencies can accept. Participant recommendations centered on keeping meetings to half a day, allowing more time for group work, and keeping agency business managers involved. Survey participant advice and recommendations will be integrated into future BICC and the BII work.

II. Business Intelligence Competency Center Summit Survey Results

Survey Question	97 % said yes	Yes	No	No Response
1. Was the purpose of the Summit communicated clearly?		**34**	**1**	**0**
Comments:				

- This was a really good idea.

- Continue with the e-mail communications as it is an effective means of contacting agencies staff.

- In general the Business Intelligence Initiative seems to be somewhat abstract with little concrete detail about what is going to happen and how BI tool will be used.

Survey Question	88 % said yes	Yes	No	No Response
2. Was your role as a "Summit Participant" made clear?		**31**	**4**	**0**
Comments:				

- Pre-summit e-mail regarding summit participants role was great.

- It was helpful to know beforehand that the summit would be interactive.

- I knew what to expect because my role was outlined in the e-mail notices.

- It may have been a good idea to depict the array of potential roles folks might play in the creation of the BICC.

- This issue was addressed at the start of the summit but I think that everyone's role will continue to evolve as the BICC develops.

Survey Question	88% said yes	Yes	No	No Response
3. Was the format of the Summit conducive to gathering BICC requirements?		**31**	**2**	**2**
Comments:				

- The summit format was good but as we move forward I would prefer small interactive group meetings.

- Need more time for small group discussion.

- It is difficult to provide detailed requirements when you have summit participants with varying levels of BI knowledge and who have various levels of responsibility within their organization.

- My best thinking may not have been in the 10 minute breakouts but I feel good about continuing to contribute by e-mail or other forms of contact in the future.

- I believe the BICC topic would benefit from educating the summit participants more about the background and benefits of BI and BICC.

- We stayed at the requirements scoping level which was good. A couple of scoping items clashed which I thought could have been resolved during the summit.

Survey Question	94 % said yes	Yes	No	No Response
4. Was the duration of the Summit acceptable?		33	2	0

Comments:

- Thank you for considering our time constraints by establishing an agenda to get tasks moving.

- Half a day for the summit is perfect.

- From my perspective the summit was too long given the information presented.

- In future eliminate redundant information.

- Next time please try and keep events away from the end of fiscal year – a busy time for many business managers.

5. Did VEAP provide a good explanation of the three following items:

Survey Question	97 % said yes	Yes	No	No Response
A) Business Intelligence		34	1	0

Comments:

- BI is much broader than what was presented.

- BI definition presented is what VEAP wants to focus on.

Survey Question	said yes	Yes	No	No Response
B) BI Initiative	100 % said yes	35	0	0
C) Business Intelligence Competency Center	100 % said yes	35	0	0

Comments:

- I applaud your recognition that people will drive the initiatives success.

- Yes, the advanced e-mail information was very helpful.

- Yes, even though I am over tasked with the licensing center for excellence and cannot participate in BICC my support is with you.

- Some of the information presented on the BICC was a bit superficial.

- More information could have been provided on BICC and BI benefits.

- I would like to have seen some examples of the BI tool.

- BI could have been better explained since it is such an all encompassing term.

- Provide examples of benefits and lessons learned from successful BICC implementations.

- Stay focused on improving citizen experience.

- While I am confident this initiative will create great reports the BICC may also want to consider providing training to business managers on what kinds of information managers should be looking at.

Survey Question	54 % said yes	Yes	No	No Response
6. Did the Summit team capture the necessary business BICC requirements?		**19**	**10**	**6**

Comments:

- A very good start but business requirements will still need to be flushed further.

- I feel that everyone in attendance was left with a clear understanding of the BICC.

- Well attempted however BI requirements may be significantly different for many agencies as requirements are fleshed out over time.

- I did not feel prepared to adequately or intelligently brainstorm BI requirements.

- This is an area where BI requirements are still being defined.

- For some folks BI is a new concept making it difficult for them to lay out requirements.

- It will take several meetings in order to gather good requirements.

- Since there is no statewide BICC model I would like to have seen a working BICC model.

- This is a start but requirements are not completely fleshed out.

- More detailed requirements will likely be fleshed out over time.

- It is too early to tell if all requirements have been captured, some may relate to design of shared environment.

- Not that good of a job was done but just like my last comment this might change over time.

Survey Question	86% said yes	Yes	No	No Response
7. Did the Summit cover everything that you expected to discuss?		**30**	**2**	**3**

Comments

- The forum was receptive to audience participation which was made clear from the beginning.

- Based upon where we are in the process it will be interesting to hear more about technical and process advancements as they occur.

- This was a good starting point.

- Not enough technical detail.

- I expected more time to discuss BICC details.

Survey Question	97% said yes	Yes	No	No Response
8. Was the VEAP BI Initiative team sufficiently prepared for this Summit?		**34**	**0**	**1**

Comments

- Well prepared, they did their homework and it showed.

- I would have liked to seen BI examples of what has been done in other government and/or private organizations.

Survey Question	94% said yes	Yes	No	No Response
9. Do you know whom to contact with questions about this Summit or the BI initiative?		**33**	**0**	**2**

Comments

- Yes e-mails were clear and summit presentation put faces to names – all are receptive to input.

Survey Question	65% said yes	Yes	No	No Response
10. Would you be willing to be involved in the next steps of the BICC development process?		**23**	**10**	**2**

Comments:

If Yes, how would you prefer to be contacted for follow-up?

- Contact us by e-mail, phone, and post information on the web.

Survey Question
11. What advice do you have for us going forward?
Comments

- Look for candidates that would be a good architectural fit for BI shared services and show how it works.

- Keeps the communication coming! Promotion is key!

- Keep the cost to agencies as low as possible.

- Clarity of business role and involvement of business representatives.

- Processes must be fleshed out along with technical procedures.

- Assume it will take three times longer and twice as expensive to implement.

- Define scope clearly across short-, medium-, and long-term.

- Surprised/Concern over VA being leading edge on BI and BICC. It would be ideal to benefit from other States lessons.

- You will be experiencing a significant learning curve soon, don't tarnish it because of forced schedules, take the time to walk before take off running.

- Keep in mind that unfunded mandates hurt all agencies but particularly small agencies.

- Keep communications going, solicit feedback and input.

- Flesh out pilot project, define preliminary architecture for shared environment, and define security requirements.

- Keep on with change leadership.

- Good forum. Should continue this as a means of communication.

- Guide the initiative so you are willing to accept early projects that are less than optimal and spin off the project work to optimal.

- Stay honest and real in what can be achieved and the timeframe and funding for the activities.

- Nail down and communicate cost of rollout (software/hardware) BICC and define VITA/ Northrop Grumman involvement.

- Reach out to the business managers at the agencies to get their involvement.

- I think most folks involved now are IT.

- Gather lessons learned from other BI and BICC initiatives to avoid pitfalls.

- The group appeared to be predominantly IT staff – need more knowledge workers.

- Provide ongoing ample communication e-mails with links is the most effective communication method.

- I think a big effort will be metric definition, especially for small agencies.

- Lowest total cost of ownership for all agencies.

- Keep in mind that BICC makeup should live and breathe according to specific business requirements and according to what skills are required to implement those requirements.

- Keep stakeholders realistic involved and stay honest.

Survey Question
12. What recommendations would you offer for improving future sessions?

Comments

- Keep sessions to half a day. If they need to be longer span them out over several days.

- Get the front line program folks involved.

- Maintain the involvement of business folks and clarity of the business role.

- To get buy-in from agencies include demonstrations on the selected BI tool using agency specific data for the demonstrations.

- Understand early the pitfalls and practicality of making this a reality and addressing them.

- This was a great session. I appreciated the open forum and solicitation of input.

- Keep Agencies involved. I have a great respect for the VEAP challenge and its willingness to assist with IT partnerships infrastructure and connectivity challenges as it relates to the VEAP initiatives.

- More time for small group discussions and reporting out.

- Have meetings at various agencies and invite their business managers.

- Do requirements gathering at interested agencies.

- Reward agencies for participation even if just by recognition.

- Set up a SharePoint or website with a chat room for BICC members.

- Maybe part of BICC could be a forum where IT support can be shared.